

# **Fast & Furious:**

An introduction to Professional Volunteer Management

Presenters:

**Colleen A. Baldwin, Program Manager**  
**Vicky Bostick, Volunteer Coordinator**

Missoula Senior Corps  
Missoula Aging Services

- **Welcome**
- **Professional Volunteer Management**
- **Recruitment**
  - **8 Step Recruitment Plan**
  - **Marketing Campaign**
- **Job Descriptions**
- **Interview, screen, and placement of volunteers**
- **Recognition –interactive**
- **Supervision**
  - **Evaluations**
  - **Discipline & Dismissal of Volunteers**

**Contact us:**

Colleen Baldwin: [cabaldwin@missoulaagingservices.org](mailto:cabaldwin@missoulaagingservices.org)

Vicky Bostick: [recruit@missoulaagingservices.org](mailto:recruit@missoulaagingservices.org)  
[www.missoulaagingservices.org](http://www.missoulaagingservices.org)

Western Montana Volunteer Center:

[www.volunteer.umn.edu](http://www.volunteer.umn.edu)

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

# Is Your Organization Ready For Volunteers?

Before any organization can effectively utilize volunteers, its managers must appraise the organization's capacity to accommodate them. Volunteer management philosophy and practices are important, though often neglected, dimensions of this capacity.

Understanding and accepting the responsibility of volunteer management is crucial to planning, developing and maintaining a viable volunteer program. To understand this responsibility requires recognition of the value volunteers bring to nonprofit agencies; to accept this responsibility dictates that all basic management functions applicable to paid staff are similarly applied to non-paid staff (volunteers) as well. Such a philosophy on volunteerism encourages optimum utilization of volunteer human resources, providing benefits far more desirable than those created by the "just-a-volunteer" mentality. For nonprofit organizations that depend on volunteers, one clear benefit of properly managing them is a solid work team comprised of paid and non-paid staff.

On the other hand, neglecting to properly manage volunteers creates significant problems. Poor performance by the volunteer; conflict between volunteers and paid staff; and high volunteer turnover are practical examples of these problems. For the planned and existing volunteer program, many of these problems can be prevented or minimized by incorporating a systematic volunteer management assessment process.

**TIP:** Complete the attached self-assessment to evaluate your organization's volunteer management capabilities. If used in planning for a volunteer program, results of the self-assessment indicate the capacity of an organization to integrate volunteers into its staffing. Similarly, established volunteer programs are able to determine volunteer management strengths and weaknesses by performing regular self-assessment.

A  
Volunteer  
Management  
Tip From:

Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
Aging Services

## **Volunteer Program Self-Assessment**

Instructions: please rate your volunteer program in each of the following areas. The maximum points allowed for each area is indicated in parentheses. Tally the points for each section. Add the totals of all sections to obtain the grand total.

### **A. Organizational Climate**

- \_\_\_\_\_ (2)      The volunteer coordinator has full approval and support of the staff and administration.
- \_\_\_\_\_ (4)      Adequate staff support is provided for the volunteer program/services.
- \_\_\_\_\_ (5)      Management of the volunteer program/service is clearly defined as a routine part of a designated staff job.
- \_\_\_\_\_ (4)      The agency has a clearly defined rationale for the use of volunteers and this rationale does not displace paid staff.

\_\_\_\_\_ **Total score for section A**

### **B. Volunteer Administration**

- \_\_\_\_\_ (2)      A regular volunteer needs assessment is conducted.
- \_\_\_\_\_ (5)      Job descriptions are in use and are kept current.
- \_\_\_\_\_ (4)      Specific recruitment approaches are used to attract the appropriate volunteers.
- \_\_\_\_\_ (5)      Potential volunteers complete applications that are designed to provide \_\_\_\_\_ specific information useful to screening, interviewing and placement.
- \_\_\_\_\_ (4)      There is a standard process for interviews, including a standard format for \_\_\_\_\_ the interviewer outlining appropriate questions asked each potential \_\_\_\_\_ volunteer.
- \_\_\_\_\_ (1)      The interview process enables a potential volunteer to screen the agency.
- \_\_\_\_\_ (3)      There is an annual evaluation of volunteer satisfaction, which includes \_\_\_\_\_ evaluation of volunteer administration.

\_\_\_\_\_ **Total score for section B**

### **C. Orientation and Training**

- \_\_\_\_\_ (5) Training is provided for paid staff in their relationship with and supervision of volunteers.
- \_\_\_\_\_ (3) Each volunteer is given an orientation to the agency.
- \_\_\_\_\_ (4) A volunteer handbook (which contains relevant policies/procedures and which explains the volunteer's relationship to clients, the organization, and other staff) is provided to each volunteer.
- \_\_\_\_\_ (5) Specific orientation and skill training is provided for each volunteer job placement.
- \_\_\_\_\_ (3) Volunteers are given access, as appropriate, to the in-service training and other educational opportunities provided to agency staff.

\_\_\_\_\_ **Total score for section C**

### **D. Support**

- \_\_\_\_\_ (5) Adequate staff supervision and support are available.
- \_\_\_\_\_ (5) Sufficient tools, space, etc. are available to accommodate the volunteer's work.
- \_\_\_\_\_ (3) Staff periodically meets with volunteers to review performance.
- \_\_\_\_\_ (3) Adequate records are maintained of volunteer services (e.g. service hours, reimbursements, etc.)
- \_\_\_\_\_ (3) Volunteer recognition is incorporated into recognition given other staff.
- \_\_\_\_\_ (1) Volunteers are featured in agency publications or other appropriate sources for highlighting staff.
- \_\_\_\_\_ (1) Volunteers are nominated for national and/or regional awards as appropriate in recognition of their achievements with the organization.

\_\_\_\_\_ **Total score for section D**

## **E. Finance**

- \_\_\_\_\_ (3) There is adequate data to calculate the cost of the volunteer program/service.
- \_\_\_\_\_ (3) The value of volunteer services is calculated and included in the agency's financial statement.
- \_\_\_\_\_ (4) The volunteer program/service has a budget or line item that is included in the agency's annual budget.

\_\_\_\_\_ **Total for section E**

## **F. Evaluation**

- \_\_\_\_\_ (5) Each volunteer (including governance/policy making volunteers) completes a self-evaluation annually.
- \_\_\_\_\_ (4) Supervisory staff conducts regular appraisal of volunteers.
- \_\_\_\_\_ (1) The Board of Directors reviews volunteer evaluation data annually.

\_\_\_\_\_ **Total for section F**

\_\_\_\_\_ **Grand total of sections A-F (100 possible)**

What does your score tell you?

### ***Below 55***

Reflect on the areas you have not marked as representative of your agency. These are important issues to resolve before considering a volunteer initiative in your organization.

### ***55 – 70***

While your organization has much to offer, there is still a ways to go before you've created an environment to foster a strong volunteer initiative. Ask for resources which will address those needs indicated by this assessment.

### ***70 – 85***

Your organization has the strong beginnings for utilizing non-paid staff effectively. Don't stop there! Consider integrating policies that reflect those areas still missing to create the best volunteer program you can!

**85-100**

High scores here indicate your agency understands the importance of volunteer management. Remember though, that this is a dynamic arena and that the face of volunteering is apt to change over time. Revisiting and revising the policies and procedures you have in place is a must to remain the best volunteer program you can be!

# Volunteer Needs Analysis

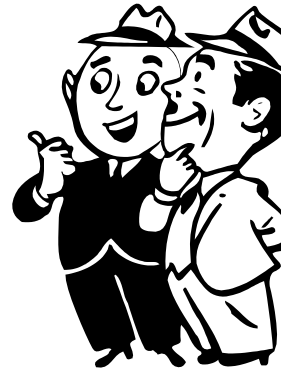
**Instructions:** Have each department/program list the major tasks that need to be done. Decide which tasks are best handled by volunteer or paid staff.

Major task	This task is best handled by:	
	Volunteer	Paid Staff
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

# 8 Step Volunteer Recruitment

- 1. What is the job that needs to be done?**
- 2. Who would want to do the job?**
- 3. Where will we find them?**
- 4. How should we go about communicating with them?**
- 5. What are the motivational needs of these people?**
- 6. What will we say to them?**
- 7. Who will do the recruiting?**
- 8. How will we know what to do? (i.e. who will get message to staff, who will train)**

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**



# Recruitment Campaign Tools

**Target Date:** \_\_\_\_\_

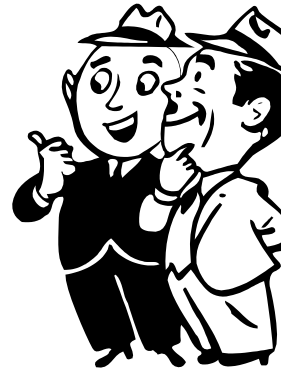
**Messages:**

**Volunteers Needed:**

**Placement of Volunteers:**

<b>Tools Needed:</b>	<b>Target Date</b>
<b>PSA's/ Media Advisory:</b>	_____
<b>Social Media: Blog/Twitter</b>	_____
<b>Publication of Information:</b>	_____
<b>Non-profit Roundup</b>	
<b>Local Newsletters</b>	
<b>Television:</b>	_____
<b>Community Ad: Radio/Newspaper</b>	_____
<b>Open House:</b>	_____
<b>Senior Lunches:</b>	_____
<b>Bulk Mailings:</b>	_____
<b>Posters:</b>	_____
<b>Sammie Board signs:</b>	_____
<b>Speaking Engagements:</b>	_____
<b>Other:</b>	_____

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## **Job Development & Design: Creating Volunteer Jobs**

Possibly the most important step in the process of volunteer management is creating the volunteer job itself. This is the firm foundation that your successful volunteer initiative is built upon. A poorly designed volunteer job, one that has not been clearly defined or is initiated without planning, can lead to problems with retaining your non-paid staff.

The proactive solution is to begin by designing a volunteer's job with the help of your paid staff ( See our tips on "Writing a Good Job Description" ). Collaborate on ideas that develop a clear picture of how the volunteer will work within your agency or organization. Remember that the tasks outlined should be reasonable and appropriate for volunteers.

Make certain the job allows the volunteer to have some 'ownership' for the duties involved and the outcome. The task of creating and managing a filing system will be more rewarding than the job of merely typing file names, and the overall task will accomplish both.

Once you've determined the job to be done by a volunteer, a precise, yet flexible job description needs to be written. Theirs should have the same format as your paid staff's job descriptions, but focus clearly on the results that you want the volunteer to accomplish.

Remember, the volunteer job description is a fluid document. It should be re-visited often throughout the life of the position and updated to meet the needs and interest of the volunteer and your agency or organization.

Allowing your volunteers the freedom to think for themselves shows you value their skills. If appropriate, involve them in planning how a task can be accomplished. Listen to their ideas and appreciate their individual input.

Let them in on "the big picture". Understanding the results of their involvement in a project can greatly impact a volunteer's sense of worth and dedication. Are they helping increase literacy among adults? Improving a neighbor's quality of life? What measurable outcome does your organization use that is directly affected by your volunteer's dedication? These are tangible results that should be shared on their level.

Your organization may rely heavily on volunteers. Organizing, designing and implementing good job descriptions and practices will ensure your success as well as the satisfaction of your volunteers.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## **Job Development & Design:**

### **Writing A Good Job Description**

Elements of a good job description are:

#### **Title**

*What is the job called?*

#### **Purpose**

*What will this job accomplish?*

#### **Activities**

*What might be done to accomplish the purpose?*

#### **Qualifications**

What knowledge and skills are needed to accomplish the purpose?

#### **Time Frame**

How many hours are involved? How long will you need this volunteer? How flexible is the schedule?

#### **Site**

*Where is the job located?*

#### **Supervision**

*Who will the volunteer report to?*

#### **Benefits**

What are the advantages of volunteering? Is there training of new skills? Free parking? Free lunch?

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps  
337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## **The Interview**

### ***A Chance to Take a Closer Look!***

#### **The Interview**

##### **Interviewing is your opportunity to:**

*Educate the volunteer about your organization and its mission and determine if potential volunteer “fits” your organization’s needs.*

1. Explain how the volunteer position fits in your agency’s mission and goals
2. Review Job Description
3. State specific requirements/information not in Job Description
4. Assess the skills and abilities of the potential volunteer
5. Follow up on questions from the enrollment application form (background checks, references, etc.)
6. Your opportunity to accept or decline a potential volunteer
7. Expand upon the volunteer position, “sell” your need/s – eye to on-going work and promotions
8. Get to know more about the volunteer
9. Assess their commitment level
10. Determine what is motivating the volunteer (for successful retention)
11. Establish a file on your potential volunteer for current or future use (or declined) – Document, Document, Document!

**TIP:** Have a list of questions to ask based on the application, references, background checks, etc.

The Interview should fit the job - Give enough time

1. 45 minutes to 1 hour for long term/complex job
2. 5 – 30 minutes for short term/simple jobs

Create a safe environment - use a private space.

A  
Volunteer  
Management  
Tip From:

Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## Recognition and Retention:

# Reasons to Recognize Your Volunteers

- **If You Don't, Someone Else Will!** Competition for volunteers is stiff and increasing daily. Don't lose your volunteers to another organization that has learned the importance of making time to acknowledge the value of their non-paid staff.
- **It's Five Times Easier to Keep Your Volunteer Than to Retrain.** Your time is valuable to your organization. Retaining a skilled and qualified non-paid staff member is a cost-effective measure saving staff time on continual orientations and training when you have volunteer turnover.
- **Recognition - A link to the community.** Recognition of your volunteers affords you the opportunity to promote your organization through highly public displays, such as marquee signs, newsletters or the media.
- **It's Easy!** The Recognition Kit offers many simple ideas as a foundation to make it personal and fit your organizations needs. It will help the public stand up and take notice of your volunteer program.
- **Recognition is Recruitment!** The reach of your non-paid staff stretches out wide into the community. It is a well-known fact that word of mouth is the number one way to recruit volunteers. A happy and satisfied volunteer is the best spokesperson for attracting other potential volunteers into your organization.
- **It's Flattering!** Recognition is an excellent way to tell your volunteers they are doing a commendable job for your organization and it's mission. It also demonstrates that you recognize that they are an important part of your organization's success.
- **It's an Affordable Paycheck!** Everyone needs recognition and a reward. We all need some kind of paycheck. Effective acknowledgement of your non-paid staff can often be their big "paycheck." Nothing is more validating than to know you are truly valued, respected, needed and appreciated.
- **It's an Investment in Earning Respect.** Recognition promotes and builds loyalty and commitment from your non-paid staff. Equally important, it builds respect and appreciation within your organization for the valuable contributions provided by your volunteers. Many organizations are unaware of the roles and services non-paid staff members are providing. Recognition builds awareness of their value and contributions.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps  
337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## Recognition and Retention:

# Site Celebration Suggestions

### Inexpensive ideas to honor your non-paid staff:

- ❖ Invite them to a special Pot Luck breakfast or lunch
- ❖ Choose a Theme that can be carried out in decorating (i.e. "Volunteers are Shining Stars" or "Hats Off To Our Volunteers")
- ❖ Reader/bulletin boards/entrances to highlight non-paid staff
- ❖ Choose a individual each month for a more in-depth biography in agency newsletter or office memo
- ❖ Thank You letters from those they serve
- ❖ Present a card with small notes from the staff about what makes them special
- ❖ Certificate (acknowledging achievements, years of service, etc.)

### Small gift ideas:

Gifts: You don't need a large budget to acknowledge your non-paid staff. The simplest things can be very meaningful simply *because you took to the time to acknowledge them*. Most non-paid staff are less concerned with what they get and ***far more impressed with the fact that they were remembered and appreciated.***

The presentation of a gift item can be as fun and rewarding as the gift itself! For example:

- ❖ A chocolate *heart-shaped* candy, key ring, pencil holder, note pad, etc. with a small note that states, "You're the *heart* of XYZ agency! Thanks for all you do."
- ❖ A *phone card* with a small note that states, "We've *called* upon your support all year. It is our chance to say thank you and to enjoy *a call on us!*"
- ❖ Show the volunteer you appreciate them a "*hole*" lot by presenting a package of Lifesaver Candy.

### Here are a few gift suggestions that seniors can use:

- ❖ A sweet roll or donut served on a decorative or colorful paper plate and matching napkin with a cup of hot coffee when they arrive can make a simple but elegant presentation.
- ❖ Your agency/school's promotional items (t-shirt, key chain, pens, coffee cups, tote bags).
- ❖ Gift certificate (for bookstores, meals out, movies, food treats, gift shops, coffee shops).
- ❖ One single flower and special note.
- ❖ A *small* bread/fruit/deli basket.

Try to stay away from things that most seniors can't use. They are generally starting to minimize clutter such as small figurines.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

Evaluation:

## Discipline

No one wants to think about having to discipline or fire a volunteer, but a good volunteer manager is prepared if the situation should arise. The impact and possibility of a volunteer relationship coming to this stage can be greatly reduced when the proper orientation and training steps are taken.

Proper disciplinary procedures:

- Act ethically and compassionately
- Act quickly
- Document every step – verbal warnings should be documented in the volunteer's personnel file.
- Clarify that this is a disciplinary action. Cite the policy, procedure or work rule they have violated.
- Clarify what has been unacceptable – clearly define what 'unacceptable' means.
- Listen to the volunteer's perspective
- Don't fall into the trap of accusing them or hearing excuses
- Clarify if this disciplinary action may lead to their dismissal
- Establish a time frame for improvement
- Follow through

It's important through the disciplinary process to express your confidence in the volunteer's ability to comply with the policy or procedure in question. Disciplinary action is a warning. It is not for immediate termination.

If disciplinary action does not provide satisfactory results, it may be necessary to terminate the volunteer's association with your agency. But before this step, consider the three "Re's"

**Re-Assign** – Would the volunteer work better in another area of your organization?

**Re-Train** – In some situations, sending the volunteer through the orientation and training process may be in order.

**Re-Vitalize** – Perhaps the volunteer is 'burnt out' and could use a much-needed vacation from their duties, with the opportunity to return refreshed.

Disciplining a volunteer need not be considered a difficult and foreboding task. Remember, you're helping them remain an important and viable person on your staff – their association with your organization needs to be as productive for you as it can be for them.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps  
337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**



## Evaluation: Dismissal

No one wants to think about having to discipline or fire a volunteer, but a good volunteer manager is prepared if the situation should arise. The impact and possibility of a volunteer relationship coming to this stage can be greatly reduced when the proper orientation and training steps are taken.

Your decision to terminate should be a last resort, and considered as severe for non-paid staff as for your paid staff.

If it becomes evident that termination must occur:

- ❖ You must be able to prove the charges for dismissal. Don't rely on hearsay.
- ❖ These charges must be sufficient to warrant dismissal.
- ❖ The cause for dismissal must be related to job performance.
- ❖ The proper disciplinary procedures must have been followed.

Once the decision has clearly been made, here are tips to conducting the actual event of termination:

- ❖ Conduct the meeting in private. This will preserve the dignity of the volunteer as well as yourself.
- ❖ Be quick, direct and absolute. Be certain the words you choose adequately convey the message. It would be embarrassing for the volunteer to show up the next day because they didn't take the 'hint'.
- ❖ Don't argue. This is a meeting for you to announce that the decision for termination has been made. If you've followed the disciplinary procedure, all arguments have been made. Expect the volunteer to vent their feelings, but remain firm and quiet.
- ❖ Follow-up. Inform the necessary individuals of the volunteer's departure. This may include clients who had a relationship with the volunteer, co-workers and RSVP.

On rare occasion, there may be grounds for immediate dismissal. In most cases, these grounds are clearly defined in the organization's employee policy manual.

Above all, be extremely careful in what is said and to whom. A volunteer may feel a personal bond and commitment to an organization. After all, when you explain to a volunteer why you no longer want his or her services, it's very easy for the volunteer to hear a personal attack.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps  
337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**



## ***Orientation and Training***

Orientation is the process your organization employs to introduce newly hired and volunteer staff to their work environment.

### **ORIENTATION:**

- General in nature
- Provides background information
- Answers the question: "What would I want to know about this place in order to better understand how it works?"
- Covers the organization's systems, operations and procedures

Training is the process your organization employs to introduce newly hired and volunteer staff to their work duties.

## **TRAINING**

- Tailored to a specific job position
- Employs a variety of formats (see tip) or techniques
- Conveys the 'do's' and 'don'ts' of the job's functions

Describes the roles and responsibilities of the position

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

# Orientation Topics

Your orientation session is the 'welcome mat' to your new volunteer. It's during this important time that you put your agencies' best foot forward, sharing your mission and philosophies.

Some topics to cover in an orientation session:

- ❖ Description and history of your organization
- ❖ Description of the programs and clientele
- ❖ How the organization relates to the community and to other agencies
- ❖ Description of the volunteer program
- ❖ Organizational flow chart and introduction to key staff
- ❖ Timeline of major organizational events throughout the year
- ❖ Volunteer manual on policy and procedures
- ❖ Facilities orientation: office layout, phones, restrooms, break rooms, parking etc.
- ❖ Volunteer benefits
- ❖ Volunteer training schedule
- ❖ Introduction of supervisory system and personnel
- ❖ Record-keeping requirements
- ❖ Emergency procedures
- ❖ Evaluation and review process
- ❖ System for changing schedule or notifying of absence

Sections of an orientation may effectively be done with groups of paid and non-paid staff. Consider revising your orientation schedule to accommodate and include all new staff.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**

## **Communication: Being a Better Listener**

Often times in our position as a supervisor or manager we are concerned with the effectiveness of how well we provide instruction or give feedback. We know the importance of choosing our words carefully to be concise and informative, but just as it is necessary to be a good speaker, we must become a good listener as well.

Being a good listener can give us a better understanding of how information is perceived. It compels us to re-think how we present our ideas and information. It's a rewarding skill that is often overlooked as a useful tool in our volunteer management training.

Here are some tips on becoming a better listener:

- Having two ears and one tongue, we should listen twice as much as we speak.
- Don't try to formulate your reply when the other person is speaking
- The person who starts a sentence should be the one to finish it.
- Don't be uneasy with the silences during a conversation. A moment of silence can be very revealing of another's concerns or thought process.
- Remember that listening is not a passive endeavor, but an activity that requires great energy. Try to listen with the same intensity as you use to talk.

A  
Volunteer  
Management  
Tip From:



Missoula  
**Senior Service**  
Corps

337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682



Missoula  
**Aging Services**